

# Oakland Consulting's commitment to the Consulting Excellence principles (2018)

## Ethical behaviour

### 1. We are responsible and good citizens

- We are members of and work actively with leading quality institutions, such as the Chartered Quality Institute (CQI), British Quality Foundation (BQF), European Foundation for Quality Management (EFQM) and British Standards Institution (BSI), to develop the quality profession and strategic thinking for individuals, organisations and broader society
- We maintain strong links with universities and business schools and their MBA programmes to help develop the next generation of Quality and Operational Improvement professionals
- We strive to be free of all discrimination or bias on the basis of gender, race, age, religion, sexual orientation or disability
- We support selected charitable organisations and regularly review the opportunities for pro-bono and charity work.

### 2. We conduct our business ethically

- We are certified by BSI that our Quality Management System complies with the requirements of ISO 9001:2015 for the provision of quality and operational excellence consulting services. These include supporting clients with: Strategy development, Planning for Quality, and Operational Excellence – including Process design and improvement, product reliability, training design and delivery, assurance and risk, and business change
- We fully engage with our clients and build long term relationships at all levels throughout all stages of project delivery, from initial engagement through to realization of benefits
- We conform to client requirements and regulatory compliance, in addition to our own IMS requirements
- We have established and comply with all statutory requirements for ethical management.

### 3. We foster an ethical culture

- We empower and support all our people to consistently deliver high quality and take part in improvement activities. This reflects our belief that people are central to delivering excellent products and services and achieving high levels of client satisfaction
- We operate an open, constructive and regular dialogue with all employees on the way the business is run, providing a platform to openly raise any concerns.

## Client service and value

### 4. We provide excellent consulting services which deliver the outcomes clients seek and need

- We listen carefully to clients' needs to determine how best Oakland can maximise value for them

- We engage only in work where we believe that Oakland is the right partner. If there are better options, then we'll say so
- We agree on the outcomes required before starting work and report transparently on progress during delivery
- We always seek to exceed our clients' expectations
- We transfer capability, working with our clients, not 'doing it to them', so that improvements are sustainable when we move on
- We work with clients to document cases where Oakland and the client have delivered 'Excellence,' and publish these through our papers, books and articles.

#### 5. We are transparent with clients and respond to their concerns

- We provide complete clarity on who is accountable for each consulting assignment
- We are open about the capabilities and competence of our consultants, adapting to client needs
- We match consultants with the right technical and personal competencies to our clients' requirements
- We rigorously protect client confidentiality, data and IP.

#### 6. We always strive to improve the value we can deliver to our clients

- We use the outputs from our research and education division, the Oakland Institute for Business Research and Education, to ensure that our approaches are at the forefront of knowledge
- We routinely capture the learning from our consulting engagements and use this to improve the services we offer. This includes information from post project completion reviews, which we seek to complete with our clients after every assignment
- We participate actively in professional networks and industry bodies to continuously improve our understanding of the quality consulting industry and the sectors we serve, in particular the CQI, BQF, BSI, MCA, EFQM, and AIAG.

### Professional Development

#### 7. We undertake training and professional development planning each year

- We have short and longer-term professional development plans for all our consultants, which are reviewed at least twice per year
- We assess performance on each project and formally twice per year for all consultants, providing constructive and developmental feedback
- We encourage innovation from all employees, in the services we deliver for clients and the way the business is run.

## 8. We promote strong core consulting capabilities and specialisms in our consultants and teams

- We ensure that we understand the service lines that individual consultants are qualified and equipped to deliver
- We only use experienced consultants, selecting people with the right specialisms for our clients' needs from our extensive associate network
- We regularly review the client work we deliver across the whole consulting team to share learning and specific approaches that have been successful
- We actively encourage consultants to develop their own capabilities through internal and external training and development.

## 9. We support our employees' career progression, professional development and welfare

- We encourage staff to actively participate in relevant professional networks
- We foster an 'Oakland family' environment, responding positively to flexible ways of working and personal needs, for example sabbaticals and family circumstances
- We regularly review consultants' progression and development through Oakland, identifying and supporting development opportunities for the benefit of the individual, the business and our clients.